



Route 40 Corridor Market Analysis

Prepared for

**Howard County
Department of Planning
and Zoning**

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Table of Contents

Introduction	ii
Demographic Overview.....	iii
Strengths, Weaknesses, Opportunity and Threat Analysis	1
Strengths and Weaknesses.....	1
Opportunities and Threats	3
Residential Development Patterns	6
Ownership Housing.....	6
Rental Housing	7
Growth Limitations	7
Commercial Development Patterns and Existing Conditions	8
Existing Commercial Development.....	8
Retail	9
Office.....	9
Industrial/Warehouse.....	10
Retail Analysis.....	11
Accessibility Patterns	11
Competitive Framework.....	11
Trade Areas	14
Alternative Scenario Development.....	16
Consumer Expenditures.....	17
Level of Supportable Future Development	19
Office Analysis and Conclusions	22
Competitive Framework.....	22
Future Office Development.....	22
Summary of Future Prospects.....	24
Appendix A: Demographic Profile.....	26
Population and Household Trends.....	27
Age	28
Ethnicity and Race.....	29
Growth Patterns	30
Income Characteristics	30
Economic and Employment Trends	32
Appendix B	34

Introduction

The Howard County Department of Planning and Zoning (DPZ) is in the process of preparing an Enhancement Study for Route 40 as called for in the *General Plan 2000*. This study will examine Route 40 and adjacent properties from the Baltimore County line west to Turf Valley Road. The Enhancement Study will address the road and its current environment, potential for redevelopment and environmental conversion and restoration. In particular, the *General Plan 2000* considers the creation of mixed-use development nodes to provide a stronger local identity and public environment as a tool for revitalization of underused or obsolete sites along Route 40. As a subset to the Enhancement Study, DPZ hired Bay Area Economics (BAE) to analyze the current and future market for retail and office space in the corridor.

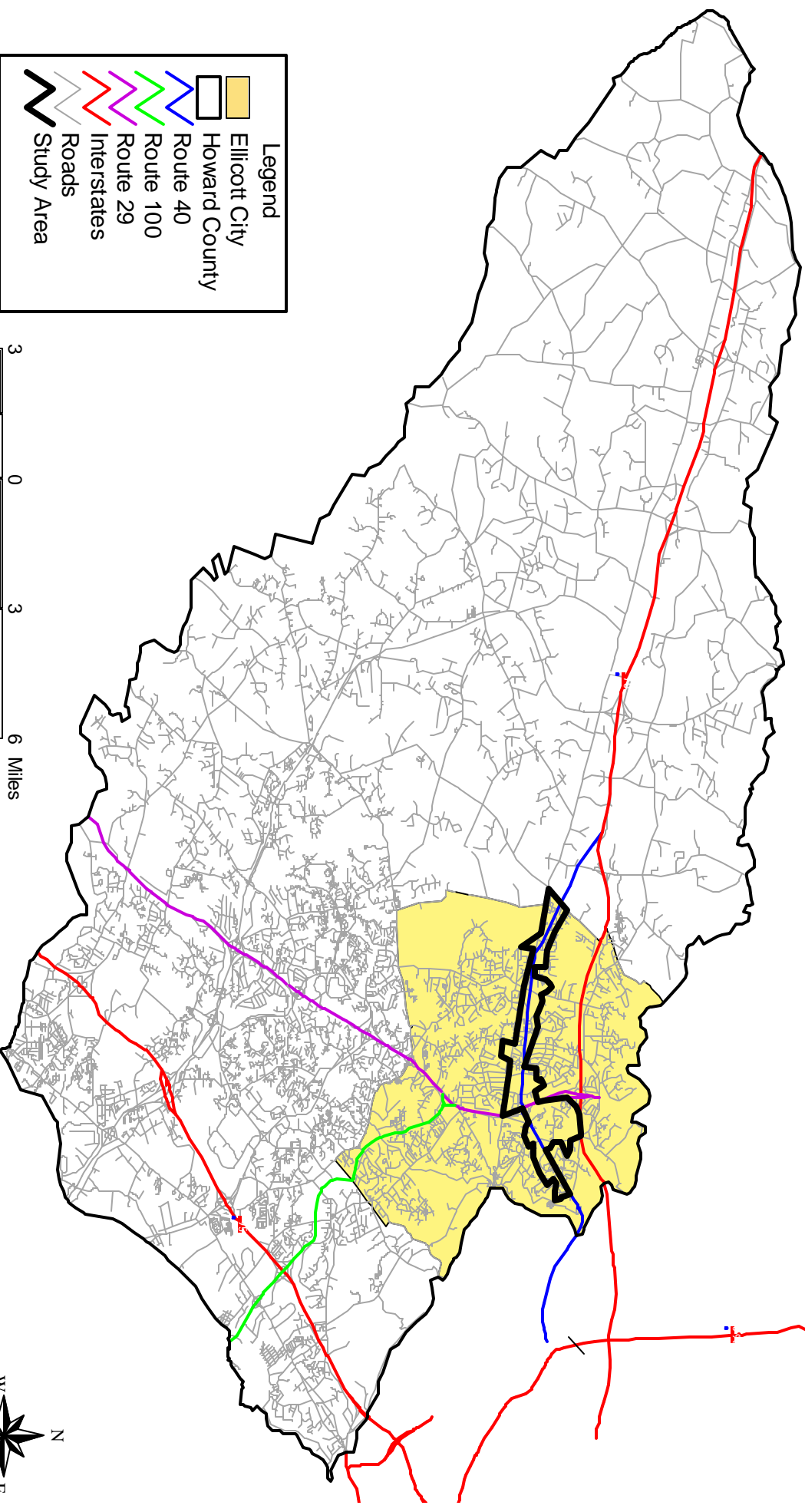
The market study analysis reviews economic and demographic trends, existing conditions for housing and commercial development, and the extent and nature of competitive development. The economic and demographic characteristics of the Route 40 neighborhood compare with county-wide trends and provide a backdrop for the area's current demand. The study details the existing and planned competitive supply for development. Estimates about the potential future demand for the corridor are based on these existing conditions, information from comparable markets and the future scenarios growth projections.

The seven-mile study corridor along Route 40 dates back to the 1920's when the Federal Highway System constructed the road as a part of a highway connecting Delaware to California. This major new highway significantly impacted development patterns along the corridor. Businesses formed quickly to serve the new automobile traffic, dividing large farms to create commercial properties along the road, typically with sufficient room for parking. Present day Route 40 businesses continue to prosper, tapping both the high number of vehicles that travel along the road and the extensive residential neighborhoods that have developed on either side of Route 40. See map on following page for study area boundaries.

Patapsco State Park serves as a natural boundary on the eastern end of the study area and Howard County. Directly east is Baltimore County's densely developed Route 40 commercial corridor, which developed earlier than the Howard County portion of the corridor. On the western end, the Turf Valley golf course development creates a vast green expanse with a diverse mix of high-end housing. Directly west of the study area, low-density development reflects Howard County policies. The rural western portion of Howard County is outside the current planned service area boundary for water and sewer. The County uses the planned service area boundary to preserve its rural character and prevent further sprawl development. According to the Development Monitoring System Report, January 2004, Howard County has preserved more than 23,300 acres of land in rural west.

The current health of the businesses based along the corridor provides profitable returns for property owners. The success of the existing businesses constrains the pressure and opportunity for redevelopment as property owners see higher returns from continuing to rent existing buildings rather than tearing down and replacing those buildings with larger new structures. Almost no undeveloped sites are available for new development, with the exception of Turf Valley.

Howard County & Elliptic City Census Defined Place Map 1



- Legend**
- Howard County
 - Elliptic City
 - Route 40
 - Route 100
 - Route 29
 - Interstates
 - Roads
 - Study Area

Source: Esri, BAE, 2003.

Demographic Overview

Howard County's quality neighborhoods, good schools and excellent access attract many new residents. The study area continues to prosper with a more than three-percent annual increase in households, reflecting the area's high rate of residential development. Growth will continue in Ellicott City Census Defined Place (CDP) with the addition of 5,770 more households or 27.8 percent by 2020, supporting additional commercial development along the corridor. Route 40 businesses serve an affluent and diverse market; households in the primary trade area have a 2002 average income of \$83,938. A more detailed demographic profile is provided in Appendix A.

Strengths, Weaknesses, Opportunity and Threat Analysis

A traditional Strengths, Weaknesses, Opportunities and Threat (SWOT) analysis outlines the competitive advantages and chances for improvement while considering barriers and obstacles to success.

Strengths and Weaknesses

Most of the corridor's shopping centers have a strong tenant mix. Commercial property owners and managers along Route 40 report little difficulty keeping retail spaces occupied with available retail spaces leased quickly. On average, available retail space spends less than 30 days on the market before a new tenant occupies the space. According to local retail brokers, rents continue to grow at a healthy pace. In most cases rental growth exceeds annual Consumer Price Index (CPI) adjustments for inflation. There are limited vacancies in the corridor, with the majority of available space in medium-sized spaces of 3,000 to 5,000 square feet in a few individual shopping centers. In addition, brokers report that several larger retail operations desire locations along Route 40. With few, if any, large development sites available, these retailers cannot locate in the corridor.

The high to moderate incomes of the residential community provide a secure base for retail and service operations along the corridor. As would be expected, homeowners tend to have higher incomes than renters, 18 percent of Ellicott City owners have incomes of \$150,000 or more, while only one percent of renters do. Owners make up the majority of Ellicott City's population with only 25 percent renters, according to the 2000 U.S. Census. These households provide a strong consumer spending power for local businesses.

Ranked as one of the top Maryland school programs, Howard County's schools draw families, thus creating strong residential demand. Students in the schools located in the market study area continue to score well on standardized national tests. The success of these schools attract residents from around the Baltimore-Washington metropolitan area.

The diversity of the housing mix within the study area gives good residential choice. Individuals may upgrade their housing selection while remaining in the same community due to the generous mix of housing in the area. Start-up townhouses offer first-time homebuyers a moderately-priced option. On the high end, Turf Valley's extensive housing selection includes luxury furnished apartments and single-family homes.

Excellent accessibility tops the list of strengths along the corridor. Route 40 has outstanding access to area highways and secondary street systems. The area's commercial business and services are easily accessible for residents via the secondary neighborhood roads, and commuters use Interstate 70, Route 29 and Route 175 to access Route 40.

Perhaps the most noticeable weakness along the Route 40 corridor is the lack of large development sites. Within the study area there is only one large "greenfield" site in excess of five acres available for new development, and that site has been acquired by the County for future consolidation of its government center.

The high value of existing property along Route 40 results from the retail and business success of the corridor. However, this success and the income it brings deter property owners from considering redevelopment opportunities. While some sites are not developed to their highest and best uses, the on-going rental revenue is typically too high to justify tearing down a building for redevelopment.

The corridor's office market lacks the unique assets necessary to compete with downtown Baltimore and suburban Class A office space in Columbia. The corridor has no identifiable office core with easy pedestrian access to support services and facilities. A Route 40 location cannot provide as easy access to Baltimore and Washington as do Columbia and other locations in the I-95 corridor between Baltimore and Washington, making it more difficult to attract a diverse labor pool. Limited public transportation services also constrain the ability of Route 40 businesses to attract workers. As a result of these competitive disadvantages, the corridor provides Class B office space primarily, relying heavily on government tenants and businesses serving the local population.

During the early development of Route 40, Howard County did not require nor consider stormwater management. Since 1974, Howard County requires specialized stormwater management studies to address the unique conditions and site constraints associated with negative impacts of stormwater runoff. Some older portions of densely developed areas around the county, such as the eastern portion of Route 40 corridor, have development within the 100-year floodplain and streams. While Howard County has made considerable efforts to remedy these problems as new development or redevelopment occurs, areas such as Nob Hill, Normandy, Valley Meade and Chestnut Hill continue to suffer from flooding problems. A few property owners expressed concern with County regulations limiting redevelopment based on the stormwater management problems along the corridor. The lack of existing stormwater management capacity requires large financial investments in order to significantly reconfigure or redevelop existing developments. These financial obstacles resulting from the development standards for businesses along the corridor may inhibit further investment for redevelopment or extensive rehabilitation.

As development occurred over a long period of time, neighboring parcels rarely coordinated their development efforts. As a result Route 40 developed as an often hostile pedestrian environment without continuous sidewalks.

The following table summarizes the strengths and weaknesses of the Route 40 corridor.

Strengths	Weaknesses
Highly successful business and service operations, with strong demand for additional retail space	Limited availability of large development sites to accommodate larger retail / entertainment users or mixed-use development
High- to moderate-income residential community with strong consumer spending power for local businesses	High value of existing property deters owners from considering redevelopment
Excellent school system for elementary, middle and high schools	Weak office market due to the competition from better located Class A office markets in the Baltimore-Washington corridor
Diverse housing mix allowing for a diversity in the population, thus supporting different types of commercial business	Stormwater management constraints limit development potential
Great accessibility to highway systems and secondary street systems, bringing commuter spending power to commercial businesses	Limited public transportation services
	Hostile pedestrian environment, due to the lack of continuous sidewalks

Opportunities and Threats

The seven-mile stretch of Route 40 in the study area presents several opportunities for development growth based most notably on the area's robust market. However, the area's weaknesses reveal competitive threats to the corridor's continued success due to the strength of other areas such as Columbia and the I-95 corridor and, to a lesser extent, Baltimore County.

Given the study area's affluent residential areas and limited restaurant offerings, significant opportunities exist for additional restaurant development.

The good access, visibility and location of Route 40 also make it a decent location for hotel development. Hotels require locations with access to major thoroughfares, local airports, employment centers, tourist attractions and large institutions. While the Route 40 study area is not likely to become a new hub of hotels, it does meet many of the desired site requirements for hotels and is in close proximity to Columbia and Baltimore employment centers. However, there are few undeveloped sites available, requiring a new hotel to redevelop an existing site along the corridor.

Additional residential development opportunities driven by the housing demand in Howard County range from for-sale options to rental units, varying based on the land available for development. Study area locations have potential for additional for-sale townhouses, market-rate apartments and elderly independent living facilities. The potential redevelopment and assemblage of smaller sites creates larger development sites, able to accommodate mixed-use residential development, which supports current and future demand. On-going developments include Turf Valley; Kaiser Park; Waverly; and Bozzuto Home's The Enclave at Ellicott Hills, an age-restricted community southeast of the I-70/ Route 29 interchange.

The large number of individuals from Asian or Pacific Islander descent living in the Route 40 study area represent a niche market for retailers and service operators. Over the course of the past decade, numerous establishments catering to Korean and other Asian customers have opened in the study area, including Lotte Market. For the most part, these stores have located near the Lotte Market at Route 29 or along the eastern edge of the study area.

Much of Route 40 began as agricultural land owned by several local families. As these families converted the property to commercial land use and sold property to retailers, land ownership of the corridor splintered among many different entities. Large-scale redevelopment may be constrained by the multiple ownership of properties. While there may be an opportunity for assemblage of smaller parcels to create larger redevelopment sites, the required agreements among multiple property owners or the need to buy out some owners will complicate the process. Areas with more single-entity ownership, such as Columbia, have had a competitive advantage over the Route 40 corridor.

The lack of sizable undeveloped sites for new development along Route 40 creates a competitive disadvantage for the corridor. Within Howard County other areas with undeveloped land offer less expensive development options.

Local small businesses along the market area struggle to maintain their market share and hold on the market due to the proliferation of retail chain and big box development. Local restaurants like the Crab Shanty attract customers from beyond the market area but may suffer with the entrance of chain restaurants with national or regional name recognition. As these chain restaurants open local restaurateurs often suffer from squeezed profit margins and need to adjust pricing to remain competitive.

While Route 40's heavy traffic patterns encourage much of the area's prosperity, traffic congestion threatens the long-term success of the corridor. National trends in retailing indicate that individuals continue to search for shopping options that allow easy and quick access with short drive times from their residents or place of work. As the congestion increases along Route 40, shoppers may become more reluctant to battle traffic and search for other shopping districts to meet their needs.

The following table summarizes the opportunities and threats for the Route 40 corridor.

Opportunities	Threats
Additional restaurant development with the high level of eating and drinking expenditures in the market area	Prevalence of multiple property owners, which limits potential to assemble large development sites
Economy hotel development as the Route 40 corridor provides good access, visibility and a location close to major thoroughfares	Competitive threat from areas with sizable undeveloped sites available for new development
New residential development driven by the housing demand for market-rate rental units, elderly independent living facilities and for-sale townhouses.	Vulnerability of local retailers and service operators to potential competition from national chains
Niche market opportunity for retailers and service providers oriented to the area's large Asian population	Traffic congestion reducing shoppers' willingness to come to Route 40 retailers and service providers

Residential Development Patterns

The good business climate along Route 40 can be attributed to the strength of the surrounding residential communities, heavy commuter traffic, and easy access to and from the corridor. The Route 40 corridor is an excellent location for local-serving businesses as the characteristics and history of the road nurture business development. Real estate trends along the corridor indicate a growing residential market with favorable resale values for homes.

Ellicott City's housing stock consisted of 20,770 units in 2000, including 15,554 single-family detached and attached units and 5,200 multi-family units, according to data provided by the U.S. Census.

Ownership Housing

Depending on their life circumstances, prospective homebuyers choose housing based on price; accessibility; quality of schools; house size, configuration, age and amenities; community amenities; proximity to public transportation; quality of the living environment (e.g., open space, water views); lot size; proximity to support retail and services; proximity to friends and church; neighborhood conditions (e.g., crime); investment value; and other factors.

In the study area neighborhood, owner-occupied units are primarily single-family detached and attached units. The characteristics of single-family housing sold within the study area from January 2003 to December 2003 were analyzed using data from First American Real Estate Solutions for units in Zip Code 21042. During 2003, 339 single-family homes were sold with a median sale price of \$382,500. Sale prices varied significantly based on the size of the home, as shown in the following table.

Housing Units Sold, Howard County Zip Code 21042 for January 2003 to December 2003								
	Total Square Feet							
	Less than	1,000 to	1,500 to	2,000 to	2,500 to	3,500 or		Percent
Range of Prices	1,000	1,500	2,000	2,500	3,500	More	Total	Of Total
Units Sold								
Under \$100,000	0	0	1	1	0	0	2	1%
\$100,000-\$199,999	2	7	0	1	1	0	11	3%
\$200,000-\$299,999	0	30	21	2	1	0	54	16%
\$300,000-\$399,999	0	30	43	38	4	0	115	34%
\$400,000-\$499,999	0	2	4	36	35	4	81	24%
\$500,000-\$599,999	0	0	2	2	23	5	32	9%
\$600,000-\$699,999	0	0	0	2	8	5	15	4%
\$700,000-\$799,999	0	0	0	1	3	8	12	4%
\$800,000-\$899,999	0	0	0	0	1	6	7	2%
\$900,000 or more	0	0	0	0	1	9	10	3%
Total	2	69	71	83	77	37	339	100%

Sources: First American Real Estate Solutions; BAE, 2003.

Almost one-half of the homes sold had between 2,000 to 3,500 square feet of living space, while only 21 percent were between 1,500 to 2,000 square feet. Prices ranged from \$108 to \$406 per square foot with a median of \$182.

Rental Housing

The Route 40 study area has many large apartment developments, including Town and Country, Normandy, Kaiser Park and Park View. These developments built from the mid 1970s to the 1980s (with the exception of Park View Phase II which was recently built) have between 160 to 1,300 units and offer such amenities as an on-site health club, central air conditioning and on-site laundry facilities. The majority of the units are one- and two-bedroom units with 560 to 1,000 square feet. Monthly residential rents range from \$0.93 to \$1.21 per square foot. On average rents range from \$680 to \$950 per month for unfurnished apartments.

Growth Limitations

The Adequate Public Facilities Act of 1992 requires the County to allow development only in areas with adequate public roads and schools according to the General Plan growth objectives. Any major increase in residential density needs to be matched with adequate public facilities. Recently, residential development in the Route 40 corridor has been constrained by school capacity limits.

Ellicott City has the largest number of units in the subdivision process with 2,701 representing 39.6 percent of potential units county-wide, according to the Howard County Development Monitoring System Report from January, 2004. Fifty-six percent of these potential new units will be apartments, with 1,187 new single-family detached and attached units. These units will be built over the next several years in additional phases of existing residential projects such as Turf Valley and the Taylor properties. In conjunction with these planned units, estimates for the Ellicott City household growth show an increase of 27.8 percent from approximately 20,700 households in 2000 to more than 26,500 in 2020.

Commercial Development Patterns and Existing Conditions

An initial review of the existing demographic conditions establishes the type of demand from consumers and tenants for additional retail and office space. A more detailed analysis of the characteristics of different types of land use, such as housing, retail or office, provides an understanding of supply. In addition, planned changes to the current environment, including public and private sector plans for an area may change the future demographics of the Route 40 study area.

Existing Commercial Development

BAE completed a business inventory for the seven-mile study area, updating Dun and Bradstreet business information provided by Howard County. The inventory in Appendix B lists each business currently located along Route 40 and the corresponding maps show the locations of these businesses. In total, there are more than 290 retail and office operations.

The corridor's extensive inventory of commercial space includes an estimated:

- 408,000 square feet of shoppers' goods space;
- 324,000 square feet of convenience goods space;
- 219,000 square feet of eating and drinking establishments;
- 227,000 square feet of hardware retailers;
- 208,000 square feet of personal care and non-auto repair services;
- 289,000 square feet of auto-related businesses;
- 268,000 square feet of miscellaneous services; and
- 139,000 square feet of finance, insurance and real estate businesses.

Shoppers good include clothing furniture and the types of general merchandise typically sold in department stores. Convenience goods include supermarkets, other food and beverage stores, and health and personal care goods stores such as drugstores.

Within the market study boundary there are several business nodes with service-oriented businesses that draw their customers from local residents and commuters. The majority of these retail uses serve the local population, including grocery stores, take-out food operations and restaurants, personal services such as hair and nail salons, auto repair and auto dealerships, hardware stores and major discounters. The highest concentration of retail space occurs within the four major shopping centers located at the intersections with major north/south collector roads.

The corridor's commercial stock contains free-standing pad development sites and commercial strip centers built initially in the mid-1930s and further developed in the late 1980s and 1990s. For the most part, the existing commercial space is designed to fit the needs of modern retailers and service providers. The majority of the small to medium stand-alone office buildings located throughout the corridor represent modern Class B office space.

The Route 40 commercial market operates as a high-quality suburban community business strip. The commercial market is very strong with commercial rents ranging from \$18 to \$25 per square foot plus expenses ("triple net") for most shopping centers. Triple net rent requires tenants to pay

all associated utilities, insurance, taxes, and maintenance costs. According to data provided by the Howard County Economic Development Authority, triple net rents range from \$28 to \$32 per square foot in Ellicott City, and \$14 to \$45 county-wide. However, these data represent historical trends; only one active property is currently available within the study area.

These commercial rents vary from shopping center site to pad site, depending greatly on the age and condition of the building as well as the usage. For example, fast food operations tend to pay higher rents than hair salons. For office development the rental rates vary based on the location and condition of the office space. Along Route 40 small to medium-sized multi-tenant office buildings offer competitive locations. Additional office space in retail centers with limited visibility from the road is available at much lower rents.

Retail

Route 40 is a healthy business corridor with limited retail vacancies. The area is dominated by convenience retail, services, fast or carry-out food and selected big box stores. There are three predominant business clusters with different characteristics. The first business cluster located in the western end of the study area is centered around Centennial Lane. Enchanted Forest, Princess Shopping Center and Pine Orchard represent the largest shopping centers and the majority of commercial business activity. Anchored by Safeway, the Enchanted Forest Shopping Center includes the widest range of retailers. The second business cluster around the Chatham Road and Route 40 intersection includes the Chatham Station Shopping Center anchored by Home Depot, Kmart and Giant Food and St. John's Plaza, anchored by the new Mars supermarket. The third business cluster centered around Rogers Avenue offers a diverse retail mix with the Lotte Market, SuperFresh supermarket and Normandy Shopping Center. Overall, the third business cluster includes more low- to moderate-priced independent retailers, many of whom target the Asian-American market with specialty stores. A free-standing Wal-Mart super center is located near the third cluster just north of the U.S. 29/Route 40 intersection.

Office

The majority of office space along Route 40 consists of neighborhood-serving offices for local banks, doctors, accountants, attorneys and insurance agents. These office tenants depend on good access to area residents and are often more price sensitive than are larger corporations. They typically seek Class B office space.

Larger corporate office users look for business park locations and/or Class A office buildings with prominent locations, excellent access, state-of-the-art building systems and high quality standard finishes. In the suburban Baltimore market, most of this space is located in Columbia, the Baltimore-Washington corridor, Owings Mills, Towson and Hunt Valley. Office developments in Columbia and along Route 100 offer strong competition to the Route 40 corridor. Larger office uses such as Newell Rubbermaid Inc. or Neschen AG recently moved into more popular Howard County office locations with Class A office space in Columbia or elsewhere.

Howard County government plans to expand its municipal service operations with new development proposed for the 24.6 acres southwest of the Rogers/Route 40 intersection. This is the largest undeveloped site along the corridor; unfortunately, the site's topography, which includes a central ravine and stream, will minimize the size of the development. Preliminary plans call for a total of 280,000 square feet of office space with 150 parking spaces for visitors

and a 600-car parking structure for County employees. While the County has no immediate timeline for development, the relocation of offices and consolidation will greatly impact the corridor's office market. Howard County currently occupies office space in several different buildings along Route 40. With the development of the new government center, previously occupied space will become available, adding a large amount of office space to the current market.

Industrial/Warehouse

The Route 40 corridor has a few areas with industrial or warehouse space, particularly in the western end, including the 84 Lumber site and land between Centennial Lane and Frederick Road. The minimal presence of industrial/warehouse space along the Route 40 corridor reflects the popularity and strength of retail along Route 40. Retailers are able to pay more for property, and the close proximity of residential development to the Route 40 frontage also constrains the potential for industrial and warehouse operations.

Retail Analysis

The market study analysis reviews several different geographic areas based on data availability and comparison patterns. The retail analysis depends on estimating the dollars spent by residents of the trade area. The trade area is the geography from which most of the area's retail customers are drawn. Determinations of the primary and secondary trade areas are based on current accessibility patterns, residential development concentrations, physical boundaries and the pattern of competitive shopping centers.

Accessibility Patterns

As a major east/west thoroughfare, the Route 40 corridor has excellent access to a host of major north-south routes and interstates, which include Route 29, I-70, and Route 100. Other secondary thoroughfares nearby include Routes 108, 32 and 175, which typically run east/west and parallel to the study area. Along the Route 40 corridor are several important north/south collector roads that carry residential traffic into the area from surrounding neighborhoods. These roads include Centennial Lane, Chatham Road, St. John's Lane and Rogers Road. Shopping center development patterns (Chatham Shopping Center, Enchanted Forest Shopping Center, Normandy Shopping Center and ST. John's Shopping Center) tend to cluster around these intersections.

Car traffic serves as the major means of transportation along the corridor. According to the U.S. Census, more than 91 percent of Howard County residents use cars as their means of transportation for work, compared with only 2.5 percent using public transit. The County's bus system has several stops along Route 40, on the yellow express and silver bus line. The yellow express bus route runs from the Columbia Mall north on Route 29 to Route 40 and makes several stops along Route 40 including Normandy Shopping Center, Wal-Mart, Town & Country, Chatham Station and the Miller Library. The silver bus route runs from the Government Center to Ellicott City Senior Center, with stops similar to the yellow route. In addition, Howard Transit provides curb-to-curb transportation for senior citizens and individuals with disabilities to medical appointments, senior centers and employment.

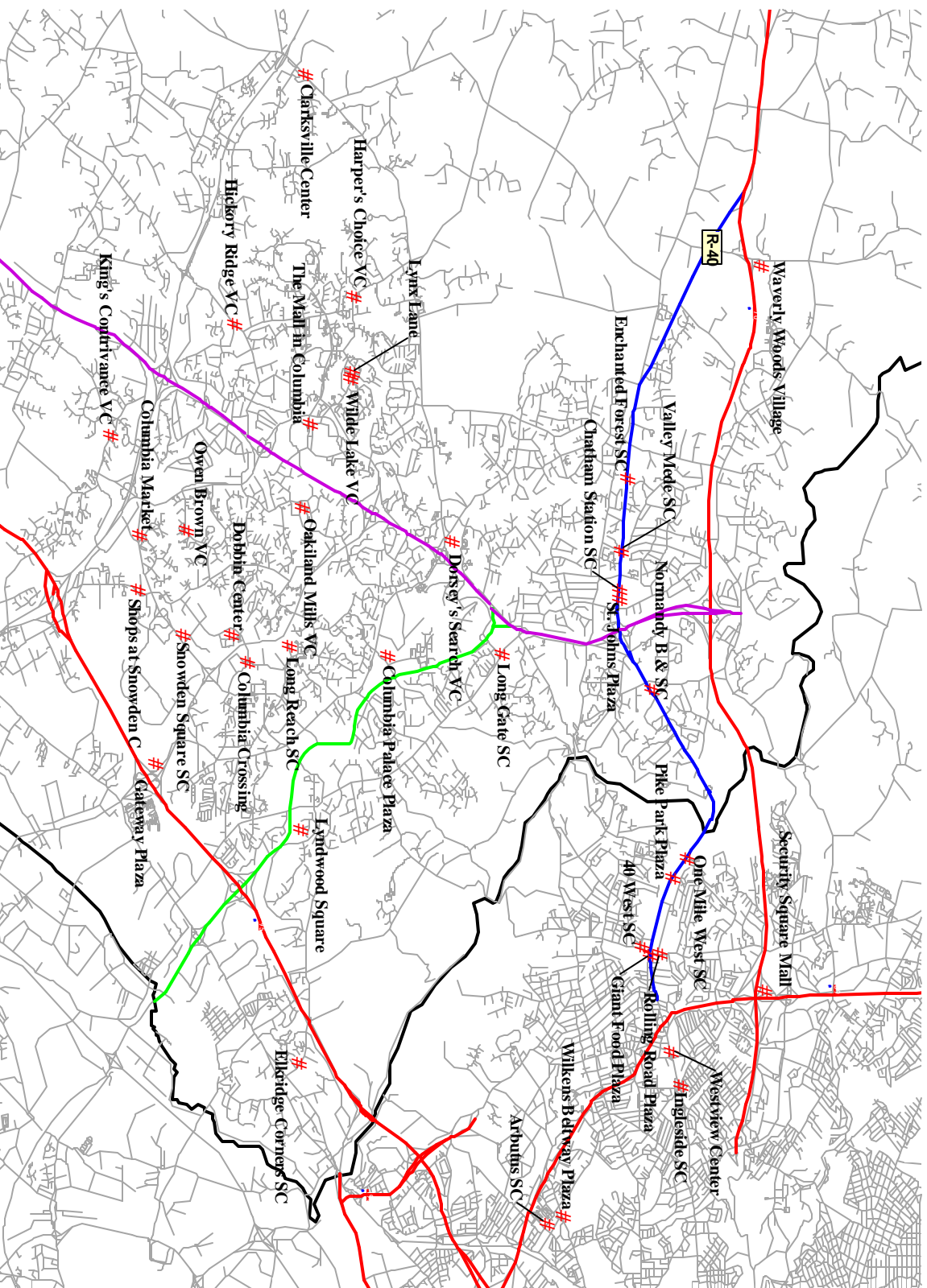
Competitive Framework

As a suburban commercial corridor, Route 40 offers a diverse mix of retail and service options with good highway access and sufficient customer parking. As such, it competes most directly with other commercial business districts located near I-95 and I-70. Competitive business corridors serving similar merchants include portions of Route 40 east in Baltimore County and shopping centers along Route 29, Route 100, Route 175 and Snowden River Parkway. The following map and table detail these competitive shopping centers, which are within six miles of the Route 40 corridor.

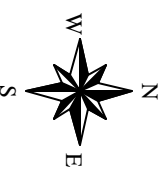
The commercial shopping centers east on Route 40 in Baltimore County include Ingleside Shopping Center, Westview Center, Wilkins Beltway Plaza and the Arbutus Shopping Center. These shopping centers are more dated than those located along Route 40 in Howard County with significantly less private investment and opportunity. Rents in these shopping centers tend to be lower than those in Howard County with a larger number of vacancies overall. The decline of these shopping centers may be attributed in part to the development of new competition in Howard County and other areas and to the lower average incomes of nearby residents.

Competitive Shopping Centers Route 40 Market Analysis

Map 2



Source: Esri, BAE, 2003.



Route 40 & Competitive Shopping Centers

Name	Address	Community	Zip Code	Type ¹	GLA w/ anchors	Average Lease Rate	Space Available	Year Opened
Chatham Station Shopping Center	9210 Baltimore National Pike	Ellicott City	21042	Community	295,587		No	1974
Dorsey's Search Village Center	41725 Dorsey Hall Rd	Ellicott City	21042	Community	103,324	\$25/sf	Yes	1989
Enchanted Forest Shopping Center	10000 Baltimore National Pike	Ellicott City	21042	Community	140,000		No	1992
Long Gate Shopping Center	4300 Montgomery Rd.	Ellicott City	21043	Regional	413,467		No	1996
Normandy Business & Shopping Center	8492 Baltimore National Pike	Ellicott City	21043	Community	188,000	\$8-17/sf	Yes	1961
St. John's Plaza	9150 Baltimore National Pike	Ellicott City	21042	Neighborhood	74,000			
Valley Mede Shopping Center	9469 Baltimore National Pike	Ellicott City	21043	Neighborhood	18,500			1991
Westview Center	5776 Baltimore National Pike	Baltimore City	21228	Regional	585,915	\$18/sf	Yes	1958
Arbutus Shopping Center	1066 Maiden Choice Ln.	Arbutus	21229	Neighborhood	91,434	\$20/sf	No	1971
Security Square Mall	6901 Security Blvd	Woodlawn	21244	Super Regional	1,200,000		Yes	1972
Giant Food Plaza	6223 Baltimore National Pike	Catonsville	21228	Neighborhood	82,099		Yes	1969
Ingleside Shopping Center	5600 Baltimore National Pike	Catonsville	21228	Community	115,410		No	1963
One Mile West Shopping Center	6600 Baltimore National Pike	Catonsville	21228	N/A	N/A		Yes	1978
Pike Park Plaza	6510 Baltimore National Pile	Catonsville	21228	Community	157,348	\$15/sf	Yes	
Rolling Road Plaza	1112 N. Rolling Rd	Catonsville	21228	Neighborhood	73,000		Yes	1971
Wilkins Beltway Plaza	4622 Wilkens Ave.	Catonsville	21229	Neighborhood	79,240		No	1981
40 West Shopping Center	700-800 N Rolling Rd	Catonsville	21228	Community	120,434		No	1964
Clarksville Center	12210 Rte. 108	Clarksville	21029	Neighborhood	7,500			
Columbia Crossing	6250 Columbia Crossing Dr.	Columbia	21045	Regional	450,000		Yes	1997
Columbia Market	9400 Snowden River Pkwy	Columbia	21046	Neighborhood	40,000		Yes	1991
Columbia Palace Plaza	8765-8775 Centre Park Dr	Columbia	21045	Neighborhood	23,944	\$18-22/sf	Yes	1994
Dobbin Center	6345 Dobbin Rd	Columbia	21045	Community	246,000		Yes	1983
Gateway Plaza	Gateway Dr	Columbia	21045	Neighborhood	23,625		Yes	1989
Harper's Choice Village Center	5485 Harpers Farm Road	Columbia	21044	Community	108,548		Yes	1971
Hickory Ridge Village Center	6400-6480 Freetown Rd	Columbia	21044	Community	130,697		Yes	1992
King's Contrivance Village Center	8600 Guilford Rd	Columbia	21046	Community	106,000		Yes	1986
Long Reach Shopping Center	8775 Cloudeap Ct.	Columbia	21045	Community	149,806		Yes	1974
Lynx Lane	5430 Lynx Ln.	Columbia	21044	Neighborhood	23,835	\$22/sf	Yes	1973
The Mall in Columbia	10300 Little Patuxent Pkwy	Columbia	21044	Super Regional	1,335,200		Yes	1971
Oakland Mills Village Center	5865 Robert Oliver Place	Columbia	21045	Neighborhood	54,000		No	1969
Owen Brown Village Center	7154-7284 Cradlerock Way	Columbia	21045	Neighborhood	73,380		Yes	1978
River Hill Village Center	6030 Daybreak Circle	Columbia	21046	Community	131,000		No	1997
Shops at Snowden Center	Oakland Mills Rd, & Snowden River Pkwy	Columbia	21046	Neighborhood	22,197		Yes	1987
Snowden Square Shopping Center	9021-9097 Snowden River Pkwy.	Columbia	21046	Regional	500,000		No	1993
Wild Lake Village Center	10451 Twin River Rd	Columbia	21044	Neighborhood	95,128	\$16/sf	Yes	1967
Elkridge Corners Shopping Center	7230-7270 Montgomery Rd.	Elkridge	21075	Neighborhood	73,529		No	1990
Arundel Mills ²	7000 Arundel Mills Circle	Hanover	21076	Super Regional	1,300,000	\$28/sf	Yes	2000
Ridgeview Plaza ⁴	2657 Annapolis Rd.	N/A	21076	Community	161,935	\$14-20/sf	Yes	1986
Waverly Woods ³	N/A	N/A	N/A	N/A	N/A		N/A	N/A
Lyndwood Square ³	N/A	N/A	N/A	N/A	N/A		N/A	N/A

Source: Shopping Center Directory 2003, BAE, 2003

Notes: ¹ Definitions are as follows for each type of center

Neighborhood centers contain convenience goods and personal services for day to day living, normally ranging from 30,000 to 100,000 square feet in size.

Community centers are normally anchored by junior department stores, super drug stores, or discount department stores with size ranging from 100,00 to 500,000 square feet.

Regional centers include two full-line department stores in general and have from 250,000 to 900,000 square feet of leasable area.

Super Regional centers normally include three or more full-line department stores; they can range for 500,000 to 1,500,000 square feet.

² Unable to show these on the map, due to location.

³ Not Listed in Shopping Center Directory.

Newer shopping centers have developed south of Route 40 within Columbia and the Route 29 and I-95 corridors as these residential areas continue to grow at a rapid pace. The Long Gate Shopping Center on Route 103 east of Route 29 is anchored by Target, Kohl's, Michaels, Barnes & Noble and several chain restaurants, taking advantage of the availability of a large development parcel to serve the Route 40 trade area population. The Columbia retail market is dominated by one major property owner, restricting the typical sprawl of strip commercial to planned commercial districts, offering a higher-quality shopping environment. Local retail brokers suggested that retail rents for new commercial development along Route 175 range from \$30 to \$35 per square foot depending on the tenant.

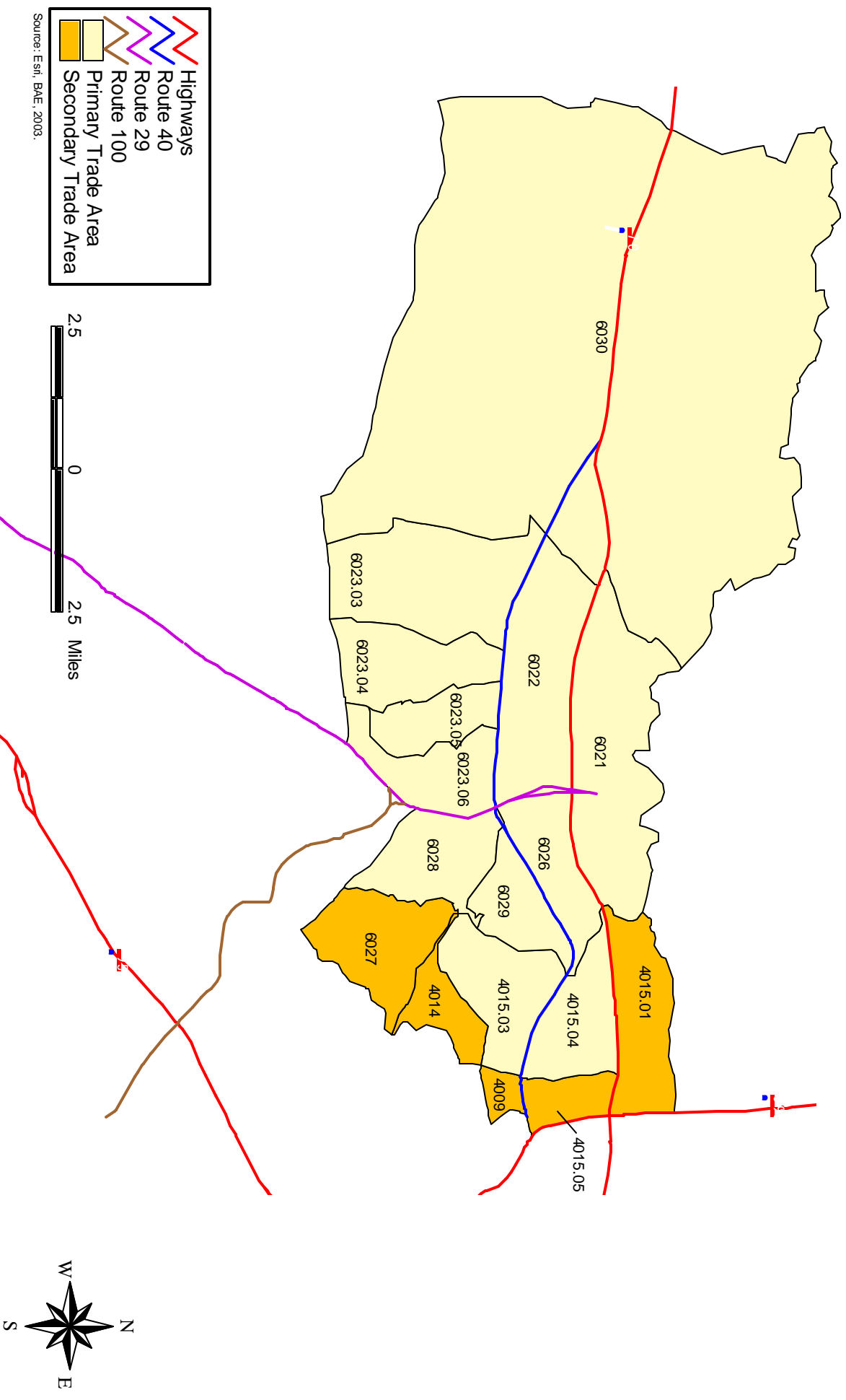
Trade Areas

The primary trade area represents the geographical area from which the largest share (75 to 80 percent) of repeat sales will be derived, typically extending three to seven miles with a driving time of 5 to 20 minutes. As previously mentioned Route 40 has excellent access and serves an abundance of traffic, with average daily traffic volumes of 16,000 west of Cemetery Lane and 56,000 east of Route 29 along the corridor. The primary trade area includes the following census tracts in both Howard and Baltimore County: 6021, 6022, 6023.03, 6023.04, 6023.05, 6023.06, 6026, 6028, 6029, 6030, 4015.04 and 4015.03. The map on the following page outlines the primary and secondary trade areas.

The secondary trade area generates from 10 to 15 percent of total sales, and includes shoppers from outside the primary trade area primarily located in Baltimore County. The secondary trade area expands the trade area to the east as development patterns west of the study area are much less dense. Census Tracts 4009, 4014, 4015.01, 4015.05 and 6027 make up the secondary trade area. Typically these shoppers travel along Route 40 to specific retail shops or service establishments as they have other shopping choices in competitive commercial districts closer to their homes.

The inflow demand for the market consists of spending by persons from outside the area, who are attracted by the type of businesses/services offered and/or who travel the Route 40 corridor to get to work each day. Daily commuters may stop along Route 40 on the way to work in the morning to pick up coffee and food and then shop at the grocery stores, video rentals and other retail on the way home in the evening.

Market Trade Areas Howard County, Route 40 Map 3



Alternative Scenario Development

The market analysis considers two alternative development scenarios based on the population projections from Howard County and the anticipated potential for redevelopment that could result in increased residential density.

The first scenario projects future households and potential spending based on Howard County-generated population projections¹. Population projections for the first scenario indicate a 27-percent increase from 25,647 households in 2002 to 32,595 households by 2020 for the Primary Trade Area.

The second scenario assumes that selected sites with a total of approximately 100 acres are redeveloped to accommodate an additional 1,360 households within the Primary Trade Area. This would yield a total 2020 household count of 33,955 in the Primary Trade Area. Under both scenarios the secondary trade area increases from 7,344 households in 2002 to 10,482 in 2020.

Table 1: Population and Household Trends for Future Scenarios

	Scenario One							
	Primary Trade Area				Secondary Trade Area			
	1990	2002	2020	Annual Growth '02-'20	1990	2002	2020	Annual Growth '02-'20
Population	53,911	71,022	84,286	1.0%	18,273	18,981	25,142	1.6%
Households	19,461	25,647	32,595	1.3%	5,962	7,344	10,482	2.0%
	Combined Trade Area							
	1990	2002	2020	Annual Growth '02-'20				
Population	72,184	90,003	109,428	1.1%				
Households	25,423	32,991	43,077	1.5%				
	Scenario Two							
	Primary Trade Area				Combined Trade Area			
	1990	2002	2020	Annual Growth '02-'20	1990	2002	2020	Annual Growth '02-'20
Population	53,911	71,022	87,803	1.2%	72,184	90,003	112,945	1.3%
Households	19,461	25,647	33,955	1.6%	25,423	32,991	44,437	1.7%

Source: Howard County Department of Planning and Zoning; Baltimore County Department of Planning; Claritas, 2003; Bay Area Economics, 2003.

¹ The Primary Trade area consists of the following TAZs: 1010, 1011; 1012; 1013; 1014; 1015; 1016; 1017; 1018; 1019; 1020; 1021; 1022; 1023; 1024; 1025; 1026; 1027; 1028; 1029, 1033, 1034, 1035, 1036, 1037, 1040, 1041, 1042, 1043, 1044, 1045, 677, 678, 679, 680, 681, and 682.

Consumer Expenditures

The success of the commercial corridor depends heavily on the income levels within the market trade area. As mentioned above, Howard County and Ellicott City have considerable purchasing power due to the area's higher-than-average household incomes. It is critical to understand the dollars available and the retail and service categories that attract the majority of area households' disposable income. This will illustrate the need for additional types of services and retail operations based on consumer preferences.

Estimates prepared by Claritas, Inc., a national data provider, indicate that the households in the primary trade area had a median income of \$83,938 in 2002. By contrast, median income for secondary trade households was \$60,152. Interestingly, Howard County's median income for 1999 was \$74,167 and the national median income was \$41,994. The trade area households' higher incomes generate higher retail spending and attract a range of retailers to meet their demands.

The heavily trafficked road and secondary road systems bring large numbers of consumers to local businesses. Route 40 retailers also tap employees working in the corridor and pass-by commuters. Sales to these additional consumers are considered "inflow" from beyond the trade area.

Spending by major store type is estimated as a percent of household income based on Maryland retail sales reported in the 1997 U.S. Census of Retail Trade. Shown in the following table, the potential expenditures by trade area residents are reported by major category of retail and service operations often found in suburban strip commercial developments. These represent all the dollars that trade area residents spend on these types of goods. Not all of those dollars are or will be spent in the Route 40 corridor due to the extent of competition offered by area malls and other shopping centers as well as the tendency to spend while on vacation, over the Internet, by mail order or near one's work.

Actual retail sales by Route 40 stores depend on their "capture" of those potential expenditures. Capture rates measure the share of potential spending that comes to an individual store or shopping area. For groceries, drugstore items and other "convenience goods", capture rates from the primary trade area are relatively high because most consumers do not need to drive far to find the types of food they are seeking given the ubiquity of supermarkets and drugstores. Shoppers goods refer to the types of merchandise sold by department stores – apparel, furniture, home furnishings, gifts, books and sporting goods. Most consumers prefer the opportunity to comparison shop for such items and will travel to a shopping center or district where they can visit several shops. Because these are larger and more unique purchases, the shoppers are willing to drive further to find what they want. For a commercial strip like Route 40 with a preponderance of convenience retailers, capture rates for shoppers goods are much lower than for convenience goods. Capture rates are also lower for secondary trade area residents given the longer distances from their homes to the study area stores.

Table 2: Retail Sales Potential for 2002

<u>Retail Type</u>	<u>Capture Rate</u>	<u>Primary Area Consumer Expenditures</u>	<u>Capture Rate</u>	<u>Secondary Area Consumer Expenditures</u>
Shoppers Goods				
Discount merchandising, clubs and superstores	70%	\$52,664,534	20%	\$2,950,536
Miscellaneous shoppers goods	15%	\$16,706,497	5%	\$1,091,981
Clothing	5%	\$3,130,094	3%	\$368,280
Furniture	20%	\$6,226,542	10%	\$610,501
Sporting goods	30%	\$8,818,177	10%	\$576,404
Convenience				
Grocery	85%	\$144,019,294	30%	\$9,967,638
Other Food & Beverage	35%	\$12,898,157	5%	\$361,326
Health & Personal	38%	\$19,471,125	7%	\$703,355
Eating & Drinking away from home	45%	\$48,909,352	15%	\$3,196,980
Hardware	80%	\$75,623,367	15%	\$2,780,523
Movie theaters	40%	\$1,203,028	25%	\$147,437
Personal care and repair services	65%	\$29,338,174	20%	\$1,770,111
Total		\$419,008,341		\$22,607,523

Notes: Expenditures shown in constant 2002 dollars to exclude the effects of inflation

Source: U.S. Census; Bay Area Economics, 2004.

The potential for inflow dollars from shoppers who live outside the trade areas is estimated based on the number of nearby employees and their typical spending patterns at lunch or after work, the flow of non-resident commuters and the mix of Route 40 retailers.

Table 3 illustrates the existing demand in the market place for retail and service types of businesses. Comparing this analysis to the existing supply of retail space indicates the need for replacement of obsolete retail types and the creation of additional retail. Currently, the most significant unmet demand is in restaurants or eating and drinking away from home, furniture and sporting goods. The market could support up to 178,000 square feet of additional retail space currently.

Table 3: Current Supportable Retail Square Footage in Route 40 Study Area, 2002

Retail Type	Combined Trade Area	Inflow Rate	Total Square Feet	Current Supply	Unmet Demand
Shoppers Goods					
Discount merchandising, clubs and superstores	186,000	20%	223,000	220,000	3,000
Miscellaneous shoppers goods	111,000	0%	111,000	126,000	(15,000)
Clothing	11,000	10%	12,000	17,000	(5,000)
Furniture	48,000	2%	49,000	28,000	21,000
Sporting goods	43,000	5%	45,000	17,000	28,000
Convenience					
Grocery	252,000	5%	265,000	231,000	34,000
Other Food & Beverage	51,000	15%	59,000	43,000	16,000
Health & Personal	63,000	5%	66,000	51,000	15,000
Eating & Drinking away from home	217,000	15%	250,000	219,000	31,000
Hardware	206,000	15%	237,000	227,000	10,000
Movie theaters	13,000	10%	14,000	0	14,000
Personal care and repair services	223,000	5%	234,000	208,000	26,000
Total	1,424,000		1,565,000	1,387,000	178,000

Source: U.S. Census, 1997; Bay Area Economics, 2004.

Level of Supportable Future Development

With an estimate of potential sales that can be captured by Route 40 establishments, coupled with information about typical sales productivity levels (measured as annual sales per square foot of space), the amount of supportable development can be calculated by major retail category. The sales productivity information comes from typical sales performance by stores in neighborhood and community shopping centers reported in **Dollars and Cents of Shopping Centers**, published by the International Council of Shopping Centers and the Urban Land Institute. As shown in the following table, in 2020 the Route 40 corridor under the base population-growth alternative could support a total of 680,000 additional square feet of retail space to serve the incremental new population by 2020 and current unmet demand.

Table 4: Incremental New Supportable Square Footage in Route 40 Study Area, 2020

Supportable Retail Space	Combined Trade Area	Inflow Rate	Incremental Square Feet	Current Unmet Demand	Supportable Square Feet of New Space
Shoppers Goods					
Discount merchandising, warehouse clubs and superstores	59,000	20%	71,000	3,000	74,000
Other general merchandise	35,000	0%	35,000	(15,000)	20,000
Clothing	4,000	10%	4,000	(5,000)	(1,000)
Furniture	16,000	2%	16,000	21,000	37,000
Sporting goods	13,000	5%	14,000	28,000	42,000
Convenience					
Grocery	81,000	5%	85,000	34,000	119,000
Other Food & Beverage	16,000	15%	18,000	16,000	34,000
Health & Personal	20,000	5%	21,000	15,000	36,000
Eating & Drinking away from home	70,000	15%	81,000	31,000	112,000
Hardware	66,000	15%	76,000	10,000	86,000
Movie theaters	5,000	10%	6,000	14,000	20,000
Personal care and repair services	71,000	5%	75,000	26,000	101,000
Total	456,000		502,000	178,000	680,000

Source: U.S. Census of Retail Trade, 1997; Bay Area Economics, 2004.

Comparing these estimates of supportable development with an estimate of the current inventory of Route 40 businesses allows identification of potential opportunities for new retail development. These estimates of new supportable development assume that competitive sites appropriate to each type of use could be developed. Clearly, that is not the case on Route 40 where there are no large parcels available for commercial development other than a site on Marriottsville Road at Turf Valley on the far western edge of the trade area.

In some cases the size of the supportable development is not consistent with industry standards for new development. For example, the 6,000 square feet of supportable movie theater space is well below the minimum size of new multi-plex theaters, which now prefer complexes of 40,000 to 90,000 square feet.

While the demand analysis highlights the need for additional grocery store space to serve the new households to be attracted by 2020, this may mean the expansion and modernization of existing grocers. Beyond traditional grocery store items, supermarkets now often include pharmacies, delicatessens, salad bars, florists, prepared foods for immediate consumption, bakeries, fast food outlets, banks and other specialty sections. Most of the major chains have developed large-format stores averaging 50,000 to 70,000 square feet in suburban areas. These grocers typically require high sales volumes of \$580 to \$610 sales per square feet. Route 40 has the residential density and spending potential necessary to support the existing grocery stores and the projected potential to support future expansion or the development of a new store. However, there are limited sites available for a new store.

Table 5: Incremental New Supportable Square Footage with Scenario Two in Route 40 Study Area, 2020

<u>Supportable Retail Space</u>	<u>Combined Trade Area</u>	<u>Inflow Rate</u>	<u>Incremental Square Feet</u>	<u>Current Unmet Demand</u>	<u>Supportable Square Feet of New Space</u>
Shoppers Goods					
Discount merchandising, warehouse clubs and superstores	70,000	20%	84,000	3,000	87,000
Other general merchandise	42,000	0%	42,000	(15,000)	27,000
Clothing	5,000	10%	6,000	(5,000)	1,000
Furniture	18,000	2%	18,000	21,000	39,000
Sporting goods	16,000	5%	17,000	28,000	45,000
Convenience					
Grocery	95,000	5%	100,000	34,000	134,000
Other Food & Beverage	19,000	15%	22,000	16,000	38,000
Health & Personal	24,000	5%	25,000	15,000	40,000
Eating & Drinking away from home	82,000	15%	94,000	31,000	125,000
Hardware	78,000	15%	90,000	10,000	100,000
Movie theaters	5,000	10%	6,000	14,000	20,000
Personal care and repair services	84,000	5%	88,000	26,000	114,000
Total	538,000		592,000	178,000	770,000

Source: U.S. Census of Retail Trade, 1997; Bay Area Economics, 2004.

Under scenario two, the higher population made possible by redevelopment of key sites for higher-density housing would increase those supportable developments by roughly 17.9 percent. If that redevelopment could be designed for a mixed-use project that incorporated housing and retail space into a walkable center, the potential capture rates could increase as a higher quality and more attractive environment were created for restaurants and specialty shops. Table 5 indicates that an additional 90,000 square feet of commercial space could be supported with redevelopment for higher-density housing.

Based on review of this analysis of supportable square feet of retail and service space and an understanding of the limited supply of potential development and redevelopment sites in the study area, the key retail opportunities include additional sit-down restaurants; a furniture showcase; an upscale grocery store; and a sporting goods store.

Office Analysis and Conclusions

Howard County has more than 105 million square feet of existing occupied office space with less than one million square feet located in the Route 40 study area, according to data provided by Howard County Economic Development Authority. There are approximately 3,000 existing office buildings within the county and 13 million square feet of available vacant office space resulting in a 12-percent vacancy rate county-wide. The Route 40 corridor office space has a current vacancy rate of only three percent.

Route 40's current supply of office development relies heavily on the businesses serving the surrounding population and Howard County government. For the most part the office space along the corridor consists of multi-tenant buildings with a large percentage of County government or County-related tenants. While these types of office users fill most of the existing space, most do not possess the ability to pay the high rents required to support the development of new Class A office space.

Competitive Framework

The potential for further office development within the market study area depends on the area's ability to compete with other areas. In order to be competitive for Class A office space an office location must have good access, proximity to executive housing, access to a skilled labor force and support services and retail. These factors alone will not guarantee successful office development as the pace and popularity of current development within an area may influence competition as well.

The majority of the county's new and planned non-residential development will occur in Columbia and the I-95 corridor. These areas account for more than half of the planned and recently built new commercial and industrial development within the county. In total only 7 percent of the county's planned non-residential development will be located in Ellicott City. The momentum for future major office development is happening elsewhere in the county.

Office developments in Columbia and between Route 29 and I-95 along Route 100, Route 175 and other major thoroughfares offer superior access to both Baltimore and suburban Washington markets and to Baltimore-Washington International Airport. This superior access allows office tenants to draw employees from a much broader geography than can businesses in the Route 40 corridor. Furthermore, the high-quality image and controlled environment of a business park is often more attractive to office tenants than is a strip commercial corridor. Office parks use development covenants and design guidelines to offer greater certainty that the future development next door will be of a similar quality.

Also constraining office development in the corridor is the limited public transportation service to bring employees to the area. As traffic congestion increases, office sites at transit stations are becoming increasingly competitive.

Future Office Development

The ability to attract additional office development to the Route 40 corridor will depend on providing quality sites of five acres or more with good access and visibility. The market will support additional growth with trade area population growth though the private market may be

impacted in the future by the withdrawal of Howard County agencies following the opening of the planned new government center.

Route 40 is unlikely to be able to compete with other Howard County and regional locations for major concentrations of Class A office space. The supply of available land in locations with better access, a pedestrian environment, transit service and other amenities is more than sufficient to accommodate such office development into the foreseeable future.

Market support for additional Class B office space is likely to be constrained in future years as the County vacates private multi-tenant buildings in favor of newly built County-owned buildings. West of Route 29, office demand will reflect population growth in the area, creating potential support for 10,000 to 15,000 square feet of new office space by 2020.

Summary of Future Prospects

The high household incomes and population density of surrounding areas provide an attractive consumer base for Route 40 retailers and service establishments. While additional retailers, hotels and personal service providers search for available space along Route 40, few opportunities exist for new construction. The main constraint on the corridor's long-term vitality will be its limited supply of development sites. Almost no undeveloped sites are available for new development, and the potential supply of redevelopment sites is also limited. The current health of the businesses based along the corridor provides profitable returns for property owners. The success of the existing businesses constrains the pressure and opportunity for redevelopment as property owners see higher returns from continuing to rent existing buildings rather than tearing down and replacing those buildings with larger new structures. Over time, that may become less true for some smaller properties; however, assembling several small properties into one large property suitable for new development could be time-consuming and costly. Many local governments have found it necessary to provide tax and other incentives to encourage redevelopment.

To date, Route 40 property owners have shown a good willingness to upgrade their properties over time to stay competitive. Their ability to justify reinvestment is partly due to the limited supply of competitive properties in the corridor and nearby areas. Mars found it more attractive to locate in rehabilitated space in St. John's Plaza rather than jump to a new development further west on Route 40. The long-term maintenance of Route 40 businesses will benefit from continued controls on new retail development west of the Centennial Lane/Route 40 intersection. Extension of the pattern of strip commercial development along the Route 40 frontage could undermine the viability of existing retail developments if it is too easy to abandon an existing store and replace it with a new facility further out Route 40.

If sites were available, Route 40 could better compete for quality office space by creating mixed-use centers with support retail space and restaurants within a pleasant walking environment. Incorporation of higher-density residential development would further insure the project's appeal by providing activity beyond the traditional workday hours. At the present time, the only site large enough to accommodate such a development is the property acquired by the County for expansion of the government center. Incorporation of private uses into the County development could create a more active and less sterile environment for the government center.

Over the long term, the movement of Howard County government offices out of private multi-tenant buildings into the new government center could increase vacancy rates and reduce property owners' ability to properly maintain their buildings. Assisting current office developments in filling vacancies created with the potential departure of County tenants could help to help maintain office space along the corridor. In 2001, the County's Economic Development Authority's Center for Business & Technology Development created a Business Funding Advisory Office to assist local businesses. The program is aimed at small business owners with less than 25 employees and helps these businesses obtain bank loans and other financing. This type of program could help smaller businesses fill gaps in the market along Route 40.

Given the growing competition from newly developed shopping centers elsewhere in Howard County, improving the corridor's physical appearance and pedestrian environment would help it

to maintain its vitality. An appealing streetscape coupled with sign controls and design guidelines would reinforce the corridor's role as a convenient and attractive shopping destination.

Appendix A: Demographic Profile

Population and Household Trends

The following analysis includes data for four main areas: Howard County; the Ellicott City Census Defined Place (CDP); and the Primary and Secondary Trade Areas. The Primary and Secondary Trade Areas reflect the areas from which Route 40 retailers draw the bulk of their customers. BAE has defined these areas based on accessibility patterns, residential development patterns, physical barriers and the location of competitive retail development. Each of these geographies is defined by census tract boundaries. However, when important data were not available for the specified geographies, data from similar areas were used.

Howard County's population grew from 1990 to 2000 with an annual growth rate of 2.8 percent from 187,328 to 247,842. (See Appendix Table A-1.) Population in the Ellicott City subarea of the county grew more quickly, averaging 3.1 percent annually. In the Route 40 Primary Market Area², population increased 2.3 percent annually from 53,911 to 67,844 during the same period.

Table A-1: Population and Household Trends

	Ellicott City			Howard County		
	1990	2000	Annual Growth '90-'00	1990	2000	Annual Growth '90-'00
Population	41,396	56,397	3.1%	187,328	247,842	2.8%
Households	15,076	20,250	3.0%	68,337	90,043	2.8%
Avg. Household Size	2.73	2.76		2.71	2.71	
HH Median Income	\$ 58,261	\$ 79,031		\$ 54,348	\$ 74,167	
	Primary Trade Area			Secondary Trade Area		
	1990	2002	Annual Growth '90-'02	1990	2002	Annual Growth '90-'02
Population	53,911	71,022	2.3%	14,724	18,981	2.1%
Households	19,461	25,647	2.3%	5,919	7,344	1.8%
Avg. Household Size	2.76	2.75		2.47	2.55	
HH Median Income	\$ 57,365	\$ 83,938		\$ 40,131	\$ 60,152	

Source: U.S. Census, 1990 & 2000; Claritas, 2003; Bay Area Economics, 2003.

Overall, the number of households in Howard County increased with an average annual growth rate of 2.8 percent and the Ellicott City area increased from 15,076 to 20,250 households, representing a slightly higher growth rate of 3.0 percent. Households increased by 2.3 percent annually in the Primary Trade Area and 1.8 percent annually in the Secondary Trade Area from 1990 to 2002 estimates.

² Includes Census Tracts 4015.04, 4015.03, 6021, 6022, 6023.03, 6023.04, 6023.05, 6023.06, 6026, 6028, 6029 and 6030.

⁴ The Ellicott City CDP includes 27 transportation analysis zones (TAZs): 1019, 1020, 1021, 1022, 1023, 1024, 1025, 1026, 1027, 1028, 1029, 1030, 1031, 1032, 1033, 1034, 1035, 1036, 1037, 1038, 1039, 1040, 1041, 1042, 1043, 1044, 1045.

According to the 2000 U.S. Census, household size varies by type of housing with 3.1 persons for single-family detached houses, 2.6 for single-family attached houses and 1.9 for apartments. In both Howard County and Ellicott City, 31 percent of homeowner households consist of two persons and 19 percent have three persons. Renter households are typically smaller with 41 percent in one-person households in Ellicott City and 36 percent in one-person households county-wide.

Age

Howard County's population had a median age of 35.5 years in 2000, similar to the United State's median age of 35.3. This compares with the 37.3 median age in Ellicott City for 2000. More than one-third of Howard County residents are between the ages of 25 to 44, shown in Appendix Table A-2. Residents aged 65 and over represent 9.6 percent of the total population within the Ellicott City area as compared with 12.4 percent in the nation and 7.5 percent in Howard County. The higher proportion of elderly residents in this section of Howard County reflects the popular retirement communities located along the corridor. The Ellicott City's elderly community (age 65 and older) consists of approximately 733 renters and 2,325 owners, according to the 2000 US Census.

Table A-2: Household Trends

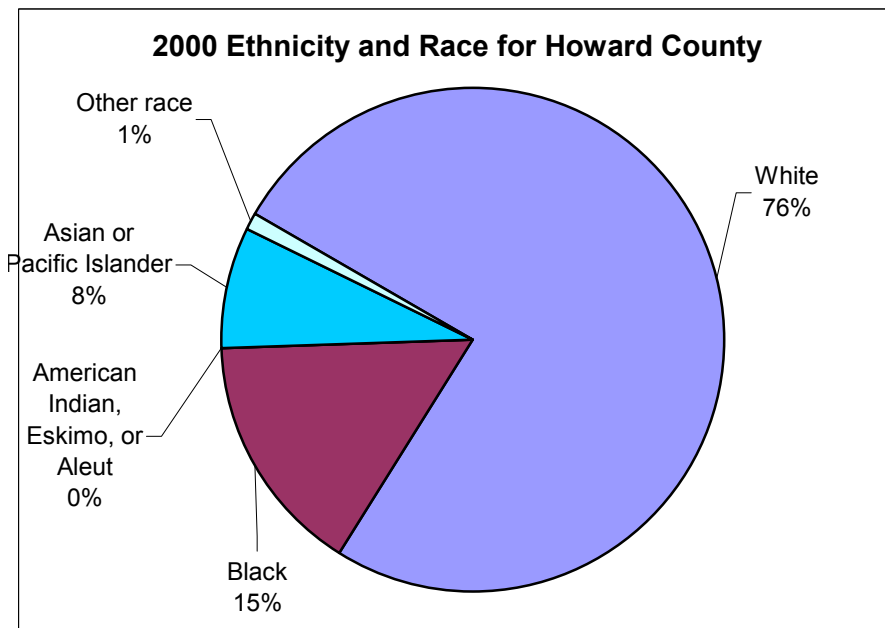
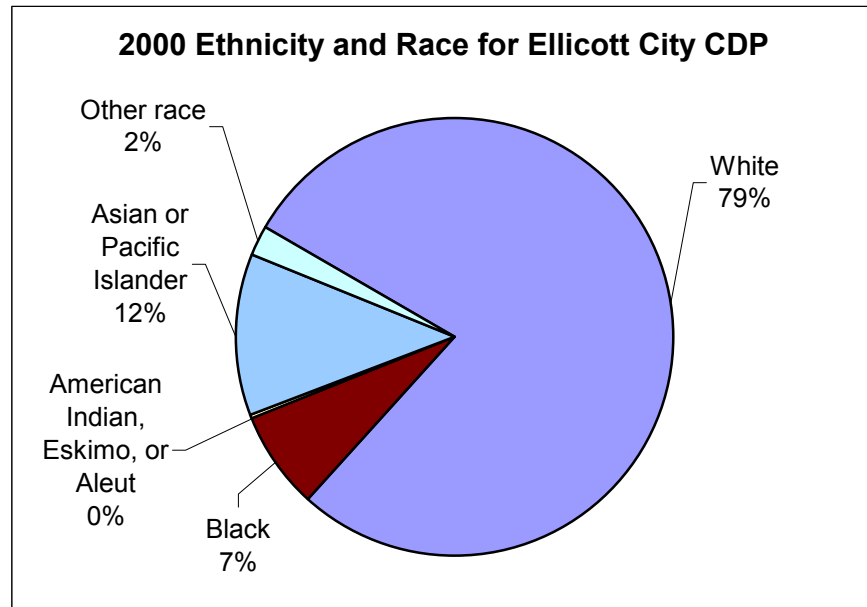
	Ellicott City		Howard County	
	1990	2000	1990	2000
Age Distribution				
19 and Under	27.8%	30.4%	28.0%	29.9%
20 - 24	6.1%	4.1%	6.8%	4.5%
25 - 34	17.2%	11.4%	20.9%	14.7%
35 - 44	19.4%	19.3%	19.3%	19.6%
45 - 54	12.4%	16.9%	12.3%	15.5%
55 - 64	8.4%	8.4%	6.5%	8.4%
65 & Over	8.8%	9.6%	6.1%	7.5%
Total	100.0%	100.0%	100.0%	100.0%
Median Age				
		37.3		35.5
Race *				
White	88.2%	78.3%	83.2%	76.0%
Black	5.2%	7.3%	11.8%	15.5%
American Indian, Eskimo, or Aleut	0.1%	0.1%	0.2%	0.2%
Asian or Pacific Islander	6.2%	11.9%	4.3%	7.7%
Other race	0.2%	2.3%	0.5%	1.1%
Household Type				
Families	76.7%	75.5%	74.2%	73.1%
Non-Families	23.3%	24.5%	25.8%	26.9%
Household Tenure				
Renter	26.0%	25.3%	27.8%	26.2%
Owner	74.0%	74.7%	72.2%	73.8%

Note: * Race alone or in combination with one or more other races

Source: U.S. Census, 1990 & 2000; Bay Area Economics, 2003.

Ethnicity and Race

Ellicott City's population reflects that of Howard County in terms of growth but has a significantly different ethnic and racial composition, as illustrated by the following pie charts.



Howard County's population is comprised of 76 percent White, 15.5 percent African American and 7.7 percent Asian or Pacific Islander. This compares with 78.3 percent White, 7.3 percent African American and 11.9 percent Asian or Pacific Islander in Ellicott City. Within the Ellicott City CDP there are 6,714 persons of Asian or Pacific Islander descent, including approximately

3,000 Korean-Americans and 1,400 Chinese-Americans. The minority population within the Route 40 study area primarily consists of a large Asian population totaling 4,410 individuals, according to data provided by Howard County DPZ.

Growth Patterns

Residential growth along the Route 40 corridor can be attributed to the accessibility it provides, strong public and commercial infrastructure, and good school districts. Currently Route 40 is located in the Eastern County school districts, which include Centennial and St. John's Lane Elementary Schools; Burleigh Manor, Dunloggin, Mount View and Patapsco Middle Schools; and Centennial and Mount Hebron High School. These schools, the quality and diversity of the housing stock, the attractive environment and existing supportive infrastructure generate strong market support for continual growth.

Since 1995, more than 16,000 residents moved into Howard County from other Maryland counties and the City of Baltimore, based on data from the 2000 U.S. Census. Howard County projects the number of county households to grow to 124,700 by 2020. The Ellicott City CDP includes 27 different transportation analysis zones⁴ (TAZs). Estimates for the Ellicott City growth show an increase from 20,755 households in 2000 to 26,525 in 2020.

The Ellicott City area is projected to experience the county's largest increase in residential development in the next few years, while the Columbia and I-95 areas within the county absorb the majority of new and planned non-residential development. According to the Development Monitoring System Report prepared in January 2004, proposed residential developments in the Ellicott City planning area will include 39.6 percent of the county's new housing units from projects in process by the year 2015. Of the total new jobs created by new non-residential proposed development, 48 percent will be located in Columbia, while only 9 percent will be located in Ellicott City. As a growth area with adequate public facilities, Columbia's number of building permits increased more rapidly than did Ellicott City's. Building permit data for non-residential development from Oct. 2001 to Sept. 2002 accounted for 117,989 square feet of new development in Ellicott City, as compared with 944,996 square feet of new development located in the I-95 corridor, 357,473 square feet in Columbia and 140,000 square feet in the western portion of Howard County.

Income Characteristics

Overall the median household income for Howard County was \$74,167 in 1999, compared to \$79,031 in Ellicott City. The Ellicott City boundaries extend beyond the defined Route 40 study area, including several additional affluent neighborhoods. Within the study area (shown in Map1), household median income ranging from \$41,237 in a census tract located east of Route 29 to \$109,480 further west in the study area. Within the broader Primary Trade Area, 2002 data indicate a median household income of \$83,938.

Roughly 35.4 percent of all Ellicott City households had incomes of \$100,000 or more, compared to 31.9 percent of all Howard County households and 35.6 percent for the Primary Trade area. Only 10 percent of Howard County and Ellicott City households had incomes less than \$25,000, shown in Appendix Table A-3.

Table A-3: Household Income Distribution

Estimated Income	Ellicott City				Primary Trade Area			
	Percent of Total		Percent of Total		Percent of Total		Percent of Total	
	1990	2000	1990	2000	1990	2000	1990	2000
Less than \$15,000	1,080	977	4.8%		1,343	1,128	4.6%	
\$15,000 to \$24,999	1,283	1,137	5.6%		1,547	1,520	6.2%	
\$25,000 to \$34,999	1,770	1,520	7.5%		2,130	1,835	7.5%	
\$35,000 to \$49,999	2,172	2,368	11.7%		3,123	2,755	11.3%	
\$50,000 to \$74,999	3,987	3,598	17.8%		5,146	4,535	18.5%	
\$75,000 to \$99,999	2,815	3,463	17.1%		3,440	4,001	16.3%	
\$100,000 to \$149,999	1,607	4,382	21.6%		2,055	5,165	21.1%	
\$150,000 and over	483	2,801	13.8%		693	3,548	14.5%	
Total	15,197	20,246	100.0%		19,477	24,487	100.0%	
Estimated Income	Secondary Trade Area				Howard County			
	Percent of Total		Percent of Total		Percent of Total		Percent of Total	
	1990	2000	1990	2000	1990	2000	1990	2000
Less than \$15,000	786	752	10.6%		4,491	4,400	4.9%	
\$15,000 to \$24,999	765	715	10.1%		5,100	4,594	5.1%	
\$25,000 to \$34,999	893	860	12.2%		7,818	6,404	7.1%	
\$35,000 to \$49,999	1,435	1,116	15.8%		12,999	10,756	11.9%	
\$50,000 to \$74,999	1,331	1,765	25.0%		18,905	19,397	21.5%	
\$75,000 to \$99,999	510	878	12.4%		11,183	15,821	17.6%	
\$100,000 to \$149,999	212	718	10.2%		6,138	17,661	19.6%	
\$150,000 and over	30	261	3.7%		2,023	11,069	12.3%	
Total	5,962	7,065	100.0%		68,657	90,102	100.0%	

Sources: Claritas, 2003; BAE, 2003.

Economic and Employment Trends

In 2000, Howard County had a total of 135,504 jobs, a 23.2-percent growth from 1990, according to data from the U.S. Census. Education, health and social service industries dominate the economy, constituting 21.7 percent, while professional, scientific, management, administrative, and waste management services made up 16.2 percent of the total employment base. This mirrors national trends that show strong growth in the service industries. Within Ellicott City, government and service industry jobs dominate.

The Ellicott City population is relatively affluent with 58.8 percent of employed residents working in management or other professional occupations. According to the 2000 U.S. Census, 8.1 percent work in service jobs and 24.5 percent work in sales and office jobs.

Trends in job creation affect employment and unemployment among residents. Howard County's labor force continues to grow with the increase in population, from 113,580 in 1990 to 139,885 in 2000, according to the U.S. Census. Recent benchmarks for 2002 indicate that the number of individuals in the labor force grew in Howard County to 151,155 with a 2.9-percent unemployment rate, which is an improvement from the 148,921 resident employment in 2001. This compares to the 2002 4.6-percent unemployment rate in Baltimore County, 4.4-percent in the State of Maryland and a national 6.0-percent unemployment rate. According to the 2000 U.S. Census, 662 or 2.2 percent of the 30,141 people in the labor force living within Ellicott City were unemployed.

Appendix B

Business Inventory for Route 40 Market Study Area, Section B

Map ID #	Shopping Centers & Stores	Type	North/South Route 40	Placed
15	1st Mariner Bank	Bank	South	Yes
16	84 Lumber	Hardware	North	Yes
17	Ace Hardware	Hardware	South	Yes
18	American Gas & Propane	Misc Retail	South	Yes
19	Arby's	Restaurant	South	Yes
20	Bradford Bank	Bank	North	Yes
21	BMW Repair	Auto Repair	North	Yes
22	Centennial Square Office Park	Office	North	Yes
23	Crafts Plus	Misc Retail	South	Yes
24	CVS	Drug Store	South	Yes
25	Double T Diner	Restaurant	South	Yes
26	Exxon Gas	Gas Station	South	Yes
27	Forest Diner	Restaurant	South	Yes
28	High's	Convenience Retail	South	Yes
29	Pizza Hut	Restaurant	North	Yes
30	Porch Swing Consign & Design	Misc Retail	North	Yes
31	Saggs Brother's Pools Unlimited	Misc Retail	North	Yes
32	Sunoco	Gas Station	North	Yes

Business Inventory for Route 40 Market Study Area, Section D

Map ID #	Shopping Centers & Stores	Type	North/South Route 40	Placed
1	Valley Mede Plaza			
	Blockbuster Video	Retail	South	Yes
	Dimtrios Hair & Tan Studio	Personal Service	South	Yes
	Domino's Pizza	Restaurant	South	Yes
	Gallery 44	Retail	South	Yes
	Pella Windows & Doors	Hardware	South	Yes
	Security Credit Union	Bank	South	Yes
	Standard Carpet	Home Retail	South	Yes
	West 40 Cleaners	Personal Service	South	Yes
2	Victoria Shopping Center			
	Bell's Deli & Meat	Food Retail	South	Yes
	Caton Realty	FIRE	South	Yes
	Jason's Wine & Spirit	Liquor	South	Yes
	Provident Bank	Bank	South	Yes
3	Village Green			
	Barber	Personal Service	North	Yes
	Clark Apples- Optical	Personal Service	North	Yes
	Cleaners Green Brite	Personal Service	North	Yes
	Elite Nails	Personal Service	North	Yes
	K Florists	Misc Retail	North	Yes
	Orek- Vacuums	Repair Service	North	Yes
	Shannon's Salon	Personal Service	North	Yes
	Shiseido Fancy	Restaurant	North	Yes
	Silver Dragon - Korean Restaurant	Restaurant	North	Yes
	Spirit Shop	Liquor	North	Yes
	Boston Market	Restaurant	North	Yes
4	Misc. Shopping Center - D1			
	Acct. Income Taxes	Business Service	North	Yes
	Allergy Asthma	Health Service	North	Yes
	Audiology	Service	North	Yes
	Coldwell Banker	Bank	North	Yes
	Dentist	Health Service	North	Yes
	Family Chiropractic	Health Service	North	Yes
	Family Dentistry	Health Service	North	Yes
	Howard County Doc. Building	Health Service	North	Yes
	Medical Eye Center	Health Service	North	Yes
	Quality Optical	Health Service	North	Yes
	Boston Market	Restaurant	North	Yes
	Jerry's Subs & Pizza	Restaurant	North	Yes
	Classic Photos	Misc Retail	North	Yes
5	Misc. Shopping Center - D2			
	Napa Auto Parts	Auto Retail	North	Yes
	Revisions, Home Remodeling	Home Retail	North	Yes

Business Inventory for Route 40 Market Study Area, Section D

Map ID #	Shopping Centers & Stores	Type	North/South Route 40	Placed
6	Misc. Shopping Center - D3			
	Cleaner Max	Personal Service	North	Yes
	Galloway Pools	Misc Retail	North	Yes
	Advance Dance Academy	Personal Service	North	Yes
	Orthodontist	Health Service	North	Yes
7	Baltimore County Savings Bank (BCSB)	Bank	North	Yes
8	Blue Point Grill	Restaurant	South	Yes
9	Checkers	Restaurant	South	Yes
10	Comcast	Office	South	Yes
11	Crab Shanty	Restaurant	South	Yes
12	Crown Gas	Gas Station	North	Yes
13	Dentist	Health Service	South	Yes
14	Dolly Car Wash	Auto Service	North	Yes
15	K Bank	Bank	North	Yes
16	Mattress City	Misc Retail	North	Yes
17	McDonalds	Restaurant	South	Yes
18	Midas	Auto Retail	North	Yes
19	Mr. Tire	Auto Retail	South	Yes
20	Parker Fuel Co.	Misc Retail	South	Yes
21	Providence Bank	Bank	South	Yes
22	Seven Eleven Mart	Misc Retail	North	Yes
23	Sunoco	Gas Station	South	Yes
24	Sunroom Hot Tubes	Misc Retail	South	Yes
25	The Canopy	Restaurant	South	Yes

Business Inventory for Route 40 Market Study Area, Section E

Map ID #	Shopping Centers & Stores	Type	North/South Route 40	Placed
1	St. Johns Plaza			
	Advanced Auto	Auto Retail	North	Yes
	Bare Bones Grill & Brewery	Restaurant	North	Yes
	Children's Orchard	Service	North	Yes
	Fast Wok	Restaurant	North	Yes
	Hair Affair	Personal Service	North	Yes
	Mars	Grocery Store	North	Yes
	Old Fashion Ice Cream	Restaurant	North	Yes
	Play It Again Sports	Misc Retail	North	Yes
	Professional Vision	Health Service	North	Yes
	Rite Aid Pharmacy	Drug Store	North	Yes
	Solana Pizza & Subs	Restaurant	North	Yes
	St. John's Cleaners	Personal Service	North	Yes
	Van Dyke & Bacon Shoes	Apparel	North	Yes
	Wells Fargo Finance	Bank	North	Yes
2	Chatham Station Shopping Center			
	David's Cigars	Misc Retail	North	Yes
	Dugout Zone - Baseball Cards	Misc Retail	North	Yes
	Giant	Grocery Store	North	Yes
	GNC	Food Retail	North	Yes
	Goodyear	Goodyear Retail	North	Yes
	Home Depot	Hardware	North	Yes
	Kmart	Discount Department	North	Yes
	Music & Arts	Misc Retail	North	Yes
	News Center Hallmark	Misc Retail	North	Yes
	Radio Shack	Misc Retail	North	Yes
	South Pacific Chinese Restaurant	Restaurant	North	Yes
	US Cleaners	Personal Service	North	Yes
3	Market Place			
	Hollywood Tans	Personal Service	South	Yes
	Sarafino's Italian Grocery	Grocery Store	South	Yes
	Starbucks	Restaurant	South	Yes
	The Breadery	Restaurant	South	Yes
	T-Mobile	Misc Retail	South	Yes
4	Misc. Shopping Center - E1			
	2nd floor offices	Office	South	Yes
	St. John's Jewelry	Retail	South	Yes
	The Flower Shop	Misc Retail	South	Yes
5	Misc. Shopping Center - E2			
	Golf	Misc Retail	South	Yes
	Nextel	Misc Retail	South	Yes
	Offices	Offices	South	Yes
6	Misc. Shopping Center - E3			
	Duron Paints	Home Retail	South	Yes
	Hair Cuttery	Personal Service	South	Yes

Source: BAE, 2003.

Business Inventory for Route 40 Market Study Area, Section E

Map ID #	Shopping Centers & Stores	Type	North/South Route 40	Placed
7	Misc. Shopping Center - E4			
	Cleaners	Personal Service	South	Yes
	Curves	Personal Service	South	Yes
	State Farm Insurance	Personal Service	South	Yes
	Subway	Restaurant	South	Yes
8	Misc. Shopping Center - E5			
	Korean Hair Salon	Personal Service	South	Yes
	Meineke	Auto Repair	South	Yes
	Rob's Barber Shop	Personal Service	South	Yes
9	Misc. Shopping Center - E6			
	Cleaners	Personal Service	North	Yes
	Lawyers Advantage Title Group	Personal Service	North	Yes
	Mi Casa Mexican Restaurant	Restaurant	North	Yes
	Nationwide Wireless/Cingular	Personal Service	North	Yes
	Team Shipping Center	Personal Service	North	Yes
10	Misc. Shopping Center - E7			
	Allstate	Business Service	South	Yes
	Edward Jones Investment	Business Service	South	Yes
	Nationwide	Business Service	South	Yes
	Touch of Brass	Misc Retail	South	Yes
11	Misc. Shopping Center - E8			
	Architecture By Design	Business Service	South	Yes
	Family Dentist	Health Service	South	Yes
	Korean Chiropractics	Health Service	South	Yes
	The Final Step	Misc Service	South	Yes
12	Misc. Shopping Center - E9			
	Academy for Enrichment	Misc Service	South	Yes
	Blackstone Industrial	Business Service	South	Yes
	DMR Associates	Business Service	South	Yes
	Doctors Offices	Health Service	South	Yes
	PCF Management	Business Service	South	Yes
13	Misc. Shopping Center - E10			
	Jenny's Hair Salon	Personal Service	South	Yes
	RHH Insurance Agency	Personal Service	South	Yes
14	Misc. Shopping Center - E11			
	Cadillac	Car Dealership	South	Yes
	Chevrolet	Car Dealership	South	Yes
	Oldsmobile	Car Dealership	South	Yes

Business Inventory for Route 40 Market Study Area, Section E

Map ID #	Shopping Centers & Stores	Type	North/South Route 40	Placed
15	Bank of America	Bank	North	Yes
16	BP Gas	Gas Station	South	Yes
17	Burger King	Restaurant	South	Yes
18	Chevy Chase Bank	Bank	South	Yes
19	Cingular Wireless	Misc Retail	South	Yes
20	Doctors Offices	Health Service	South	Yes
21	Einstein Bagels	Restaurant	North	Yes
22	EZ Storage	Misc Retail	South	Yes
23	Jiffy Lube	Auto Repair	South	Yes
24	Long & Foster Realty	FIRE	South	Yes
25	M & T Bank	Bank	South	Yes
26	Medical Center 1	Health Service	South	Yes
27	Medical Center 2	Health Service	South	Yes
28	Mobil	Gas Station	North	Yes
29	Printing	Business Service	South	Yes
30	Shell Gas	Gas Station	South	Yes
31	Sun Trust Bank	Bank	North	Yes
32	Sunny's	Misc Retail	South	Yes
33	Symmatry Hair Studio	Personal Service	South	Yes
34	The Columbia Bank	Bank	South	Yes
35	Wachovia Bank	Bank	North	Yes

Business Inventory for Route 40 Market Study Area, Section F

Map ID #	Shopping Centers & Stores	Type	North/South Route 40	Placed
1	Lotta Plaza, section 1			
	Lotta Plaza Grocery	Grocery Store	South	Yes
	Liquors	Liquors	South	Yes
	Triangle Auto Parts	Auto Service	South	Yes
	Regency Dry Cleaners	Personal Service	South	Yes
	Triangle Laundry Matt	Personal Service	South	Yes
	Nail Source	Personal Service	South	Yes
	Panda Buffet	Restaurant	South	Yes
	Shin Chon Restaurant	Restaurant	South	Yes
2	Lotta Plaza, section 2			
	Merchant's Auto Body	Auto Service	South	Yes
	House of Asian	Restaurant	South	Yes
	La Boulangerie Bakery	Restaurant	South	Yes
	Family Care	Personal Service	South	Yes
3	Misc. Shopping Center - F1			
	Await Builder's Realtors	FIRE	South	Yes
	Barnine	Misc Retail	South	Yes
	Bayside Title Group	FIRE	South	Yes
	Bear's Paw Fabrics	Misc Retail	South	Yes
	Club PM 1620	Restaurant	South	Yes
	Copy & Printers	Misc Retail	South	Yes
	Reliable	Misc Retail	South	Yes
	Sewing Machine Sales	Retail	South	Yes
	SHA Engineering Office	Office	South	Yes
	The Century Corp.	Misc Retail	South	Yes
	Travel Agent School	Service	South	Yes
4	Misc. Shopping Center - F2			
	24hr Cleaners	Personal Service	North	Yes
	American Bank	Bank	North	Yes
	Liquors	Liquor	North	Yes
	Superfresh	Grocery Store	North	Yes

Business Inventory for Route 40 Market Study Area, Section F

Map ID #	Shopping Centers & Stores	Type	North/South Route 40	Placed
5	Auto Glass	Auto Service	North	Yes
6	BP Gas	Gas	North	Yes
7	Il Giardino	Restaurant	South	Yes
8	Harper's Kitchens Appliances	Home Retail	South	Yes
9	Honda	Car Dealership	North	Yes
10	Kimmel Tire & Brakes	Auto Service	South	Yes
11	Morgan Stanley Dean Witter	Business Service	North	Yes
12	Pontiac Buick Dealership	Car Dealership	South	Yes
13	Power Academy	Personal Service	South	Yes
14	Rite Aid	Drug Store	South	Yes
15	WalMart	Discount Department Store	North	Yes

Business Inventory for Route 40 Market Study Area, Section G

Map ID #	Shopping Centers & Stores	Type	North/South Route 40	Placed
1	Normandy Shopping Center, Area 1			
	1st Source USA	Personal Service	North	Yes
	Abbey Carpet's	Home Retail	North	Yes
	Bagel Basket Café	Restaurant	North	Yes
	Computer Sales & support	Retail	North	Yes
	Fitness Center	Personal Service	North	Yes
	Flooring World	Home Retail	North	Yes
	Gynt's Full Service Spa	Personal Service	North	Yes
	His way Christian Bookstore	Misc Retail	North	Yes
	Holiday Travel	Service	North	Yes
	Karate	Personal Service	North	Yes
	Laundromat	Personal Service	North	Yes
	Merrison Chiropractic	Health Service	North	Yes
	Niko Japanese Restaurant	Restaurant	North	Yes
	Normandy Liquors	Liquor	North	Yes
	Once upon a Child	Personal Service	North	Yes
	Race Pace Bicycles	Misc Retail	North	Yes
	Ritz Camera	Misc Retail	North	Yes
	Security Enterprise	Service	North	Yes
	Tower Federal Credit Union	Bank	North	Yes
	West Coast Rides	Service	North	Yes
	York Barbell	Misc Retail	North	Yes
2	Normandy Shopping Center, Area 2			
	Framer's Vise	Service	North	Yes
	Kelsey's Irish Pub	Restaurant	North	Yes
	Ledo Pizza & Pasta	Restaurant	North	Yes
	PC Game & Comic Bang	Misc Retail	North	Yes
	Rascal's	Misc Retail	North	Yes
	The UPS Store	Misc Retail	North	Yes
	True Nails	Personal Service	North	Yes
	Verizon	Misc Retail	North	Yes
	Sew - Vac	Personal Service	North	Yes
3	Ellicott City Exchange			
	Attorneys	Service	South	Yes
	Hair & Nails	Personal Service	South	Yes
	MD	Health Service	South	Yes
	Ruriat	Misc Retail	South	Yes
4	Rogers Center			
	Cleaners	Personal Service	South	Yes
	Cleaners	Personal Service	South	Yes
	Papa Johns	Restaurant	South	Yes
	Patapsco Valley Vet. Hospital	Service	South	Yes
	Peseto Enterprise	Service	South	Yes
	Wireless	Misc Retail	South	Yes
5	Misc. Shopping Center - G1			
	Citgo	Gas Station	North	Yes
	Subway	Restaurant	North	Yes

Source: BAE, 2003.

Business Inventory for Route 40 Market Study Area, Section G

Map ID #	Shopping Centers & Stores	Type	North/South Route 40	Placed
6	Misc. Shopping Center - G2			
	Columbia Flyer Taxi	Service	South	Yes
	Law Office	Service	South	Yes
	Majestic African Braiding	Personal Service	South	Yes
	Paintball	Retail	South	Yes
	Rent a Wreck	Auto Service	South	Yes
7	Misc. Shopping Center - G3			
	Allstate	FIRE	North	Yes
	Ben- Dentistry	Health Service	North	Yes
	Chiropractor	Health Service	North	Yes
	Howard County Health Department	Office	North	Yes
	Normandy Health & Fitness	Personal Service	North	Yes
	NTA	Business Service	North	Yes
	Omni Financial	Bank	North	Yes
	Sir Speedy	Business Service	North	Yes
	Tuesday Morning	Home Retail	North	Yes
8	Acura	Car Dealership	South	Yes
9	Adult Book Store	Misc Retail	South	Yes
10	Big Screen Store	Misc Retail	North	Yes
11	Brian's Motel	Hotel	North	Yes
12	Brunswick Bowl	Service	South	Yes
13	Citizens National Bank	Bank	South	Yes
14	Dunkin Donuts	Restaurants	South	Yes
15	Ford	Car Dealership	North	Yes
16	Fraternity Federal	Bank	North	Yes
17	Infiniti	Car Dealership	North	Yes
18	Mobil	Gas Station	South	Yes
19	Saturn Car Sales	Car Dealership	South	Yes
20	Shell	Gas Station	North	Yes
21	Shell	Gas Station	South	Yes
22	Suzuki	Car Dealership	North	Yes